

Alberta Tourism Market Monitor

Monthly
Update



March 2015

For the period of January to December 2014, the occupancy rate for Alberta (excluding resorts) was 67.8%, down 0.3 points from 2013 (68.1%). For the same period, the average daily room rate for Alberta (excluding resorts) was \$142.98, up 3.5% compared to 2013 (\$138.10).

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Y-T-D Total 2014
Edmonton Occupancy Rate	58.3%	68.2%	74.1%	74.8%	72.9%	69.7%	64.8%	76.3%	70.8%	72.4%	73.5%	54.1%	69.2%
Point Change from 2013	3.5	-2.1	-0.2	-1.1	0.7	-3.8	-0.2	4.7	-3.6	-1.7	-2.1	-1.7	-0.6
Average Daily Room Rate	\$129.90	\$133.50	\$135.81	\$135.34	\$135.51	\$136.02	\$127.73	\$133.28	\$136.87	\$136.22	\$138.41	\$130.12	\$133.90
Variance from 2013	6.1%	6.4%	6.6%	5.6%	6.5%	5.9%	3.1%	7.8%	6.4%	4.6%	4.7%	0.9%	5.2%
Calgary Occupancy Rate	57.9%	63.3%	67.6%	71.3%	71.2%	76.4%	77.7%	79.3%	79.6%	73.6%	66.7%	53.6%	70.0%
Point Change from 2013	-1.8	-3.3	-2.2	-4.4	-3.4	1.1	-4.5	-1.1	-0.9	-3.5	-8.1	-1.9	-2.9
Average Daily Room Rate	\$157.27	\$161.74	\$160.21	\$164.21	\$163.50	\$184.30	\$190.01	\$150.26	\$170.95	\$171.78	\$166.03	\$153.34	\$166.67
Variance from 2013	1.2%	2.7%	5.0%	1.6%	1.0%	8.1%	1.6%	0.6%	4.5%	3.3%	1.4%	1.8	2.8%
Alberta Resorts Occupancy Rate	38.0%	45.6%	45.1%	46.1%	61.0%	75.9%	87.9%	91.8%	80.6%	54.5%	41.8%	49.6%	60.1%
Point Change from 2013	1.0	1.1	-7.7	3.8	5.6	11.1	9.4	4.7	2.9	2.9	0.6	1.3	3.0
Average Daily Room Rate	\$165.86	\$175.65	\$167.05	\$163.06	\$188.85	\$241.20	\$265.38	\$271.53	\$231.32	\$178.21	\$164.72	\$221.21	\$214.70
Variance from 2013	3.0%	4.7%	-1.3%	3.7%	5.0%	7.1%	7.6%	8.6%	3.6%	3.4%	1.1%	7.5%	6.0%
Other Alberta* Occupancy Rate	59.9%	66.4%	67.9%	59.2%	64.4%	67.1%	68.7%	71.0%	71.7%	70.2%	66.7%	49.4%	65.3%
Point Change from 2013	3.6	2.7	3.9	1.4	5.9	3.2	-1.8	0.9	0.8	0.3	-1.9	-2.2	1.5
Average Daily Room Rate	\$128.41	\$129.89	\$129.71	\$127.41	\$127.96	\$130.42	\$130.13	\$130.84	\$132.67	\$133.10	\$132.00	\$131.54	\$130.93
Variance from 2013	3.3%	3.7%	3.0%	2.3%	3.4%	2.6%	2.7%	3.7%	4.5%	4.2%	1.8%	4.9%	3.1%
Total Alberta (excluding Resorts) Occupancy Rate	58.8%	65.9%	69.5%	67.2%	68.8%	70.6%	70.3%	75.0%	73.8%	71.9%	68.6%	52.0%	67.8%
Point Change from 2013	2.0	-0.6	0.8	-1.2	1.6	0.6	-2.1	1.5	-0.9	-1.3	-3.8	-1.9	-0.3
Average Daily Room Rate	\$137.42	\$140.16	\$140.38	\$142.06	\$141.46	\$149.38	\$149.08	\$137.75	\$146.20	\$146.18	\$143.88	\$137.95	\$142.98
Variance from 2013	3.1%	4.0%	4.5%	3.1%	3.1%	5.8%	2.2%	3.7%	5.2%	4.1%	2.1%	2.9%	3.5%

No new data.

*Includes Lethbridge, Red Deer and other Alberta communities.

Source: PKF Consulting Inc.

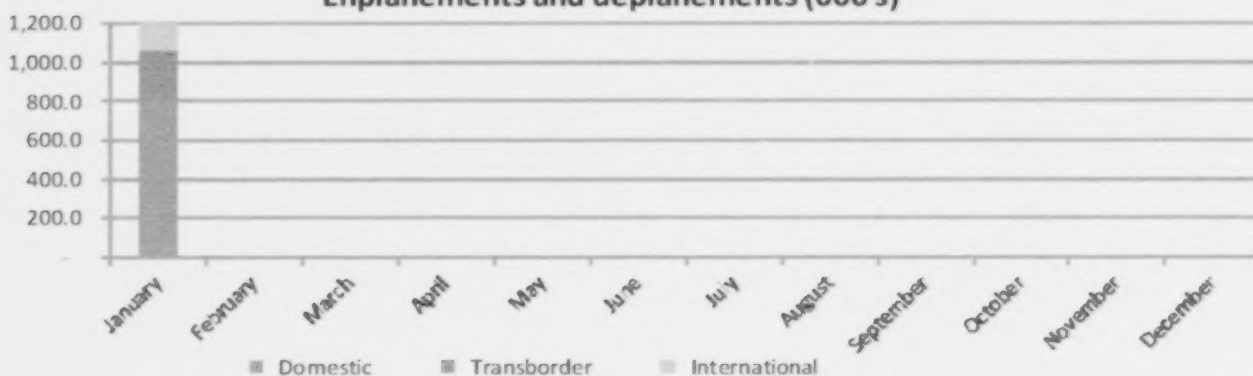
Alberta
Government

Air Passengers 2015 (enplanements and deplanements)

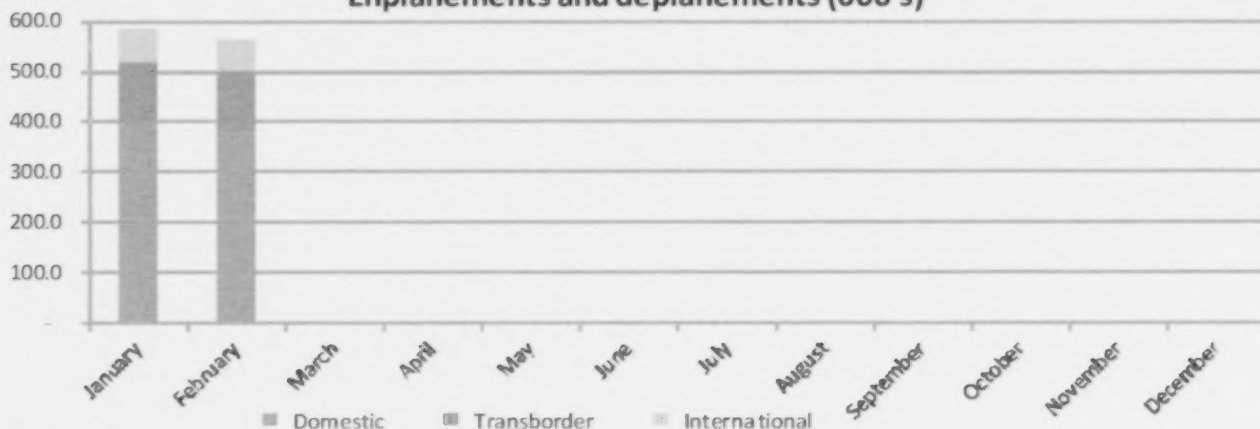
Calgary International Airport reported that 1.199 million passengers either boarded or deplaned at the airport in January 2015, a 2.3% increase compared to January 2014. Domestic passenger air traffic increased by 1.1%, while transborder passenger traffic increased by 1.8% and international (overseas) passenger traffic by 9.9%, compared to January 2014.

Edmonton International Airport reported that 561 600 passengers either boarded or deplaned at the airport in February 2015, a 0.7% decrease compared to February 2014. Domestic passenger air traffic declined by 2.9%, transborder passenger traffic decreased by 3.0%, and international (overseas) passenger air traffic increased by 17.9% compared to February 2014.

Calgary International Airport 2015
Enplanements and deplanements (000's)



Edmonton International Airport 2015
Enplanements and deplanements (000's)

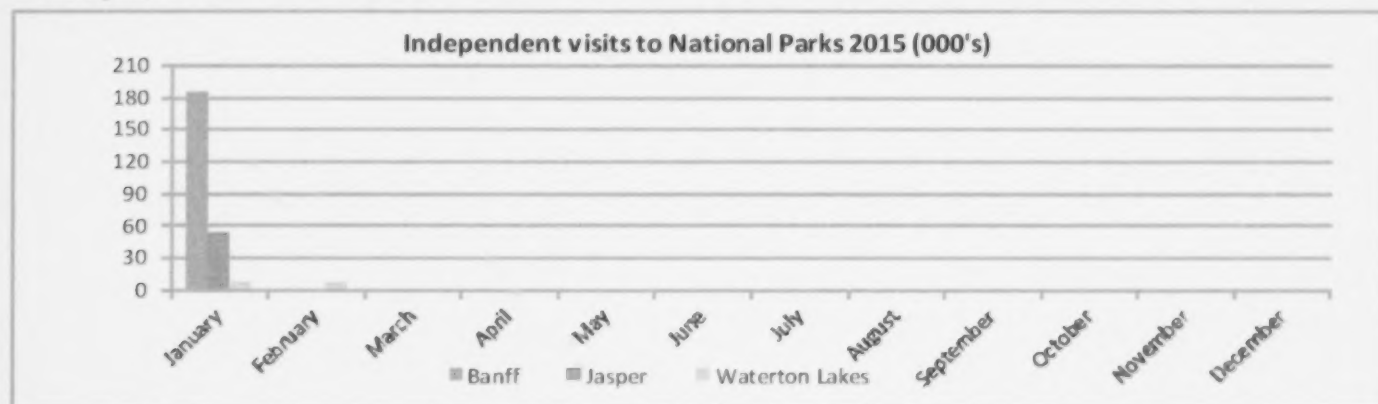


Source: Edmonton International Airport and Calgary Airport Authority

National Park Attendance 2015 ('000s of person-visits) Group Tours not included

For January 2015:

- Banff National Park received 184,908 independent visitors, an increase of 8.1% compared to January 2014.
- Jasper National Park received 52,771 independent visitors, an increase of 6.0% compared to January 2014.
- Waterton Lakes National Park received 6,730 independent visitors, an increase of 3.5% compared to January 2014. For February 2015 independent visits to the Park totaled 7501, an increase of 19.1% over the same period last year.



Source: Parks Canada.

Historic Sites and Museums 2015 ('000s of person-visits)

2015	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Y-T-D Total
Visitor Attendance	24.3	39.7											64
% Change from 2014	3.4%	-0.3%											1.1%

Source: Alberta Culture and Tourism, Heritage Division.

Employment 2015 ('000s of persons)

Employment in the Accommodation, Food and Beverage sector in Alberta increased by 1.5% in February 2015, compared to February 2014.

Preliminary-Seasonally Adjusted	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average Y-T-D Total
Accommodation, Food and Beverage	156.9	157.6											157.3
% Change from 2014	4.4%	1.5%											2.9%

Source: Statistics Canada, Labour Force Survey.

Food Services and Drinking Places 2014 (\$ Millions)

According to results from Statistics Canada's Food Services and Drinking Places survey, Alberta's unadjusted total receipts for December 2014 totaled \$744 million, an increase of 7% over December 2013.

Preliminary	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average Y-T-D Total
Total Receipts for Alberta	\$648.7	\$628.3	\$715.3	\$713.9	\$758.3	\$745.0	\$759.1	\$768.1	\$736.0	\$765.7	\$727.4	\$744.0	\$725.8
% Change from 2013	5.3%	2.7%	5.2%	8.2%	8.1%	6.4%	5.9%	6.8%	5.1%	6.9%	3.8%	7.0%	6.0%

Source: Statistics Canada, Food Services and Drinking Places (Unadjusted).

Highway Traffic Count ('000s of Vehicles) 2014

Preliminary	Hwy 1—Sask border w-bound	% Change from 2013	Hwy 1—Banff Pk Gate (2 way)	% Change from 2013	Hwy 16—Jasper Pk Gate (2 way)	% Change from 2013	Hwy 16—Jct #897 w-bound	% Change from 2013
January	55.9	1.1%	473.0	3.4%	91.8	2.1%	169.6	2.8%
February	56.0	0.0%	449.1	-4.9%	84.7	-2.0%	157.6	-1.6%
March	62.3	-2.2%	499.1	-6.8%	105.2	-6.8%	182.7	3.7%
April	71.5	9.2%	532.4	15.8%	124.6	16.1%	187.5	4.8%
May	77.3	-1.7%	586.2	1.1%	139.5	2.3%	200.7	0.2%
June	83.6	8.2%	659.8	44.1%	162.0	-8.1%	200.0	0.7%
July	104.0	0.9%	881.7	12.7%	224.4	5.3%	219.9	2.3%
August	110.5	1.7%	982.6	4.8%	264.8	7.1%	223.3	0.8%
September	79.2	-1.6%	645.7	-1.3%	154.4	-1.0%	202.5	0.3%
October	81.7	1.6%	563.7	8.0%	125.3	5.8%	210.4	1.6%
November	64.4	-2.3%	408.5	1.2%	83.6	3.2%	178.4	-0.9%
December								
Year-To-Date	846.4	1.4%	6,681.8	6.7%	1,560.3	2.3%	2,123.6	1.3%

No new data.

Source: Alberta Transportation.

Definitions of Indicators

Air Passengers—Data are preliminary estimates of the number of air passengers enplaning and deplaning. Source: Calgary Airport Authority and Edmonton International Airport (websites).

Highway Traffic—These data are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders count all vehicles by direction. Year-to-date is a cumulative total for all vehicles. Source: Alberta Transportation's Automatic Traffic Recorders (ATR).

Accommodation Indices—Occupancy rates and average daily room rates are based on a sample of hotels for each respective location. Source: PKF Consulting Inc. with reproduction and use of information subject to PKF Disclaimer and Restrictions as detailed at www.pkfcanada.com.

Historic Sites and Museums—Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Alberta Museum, the Royal Tyrrell Museum of Paleontology, and the Tyrrell Field Station. Source: Alberta Culture and Tourism, Heritage Division.

National Park Attendance—Attendance is reported as the number of independent visits to National Parks in Alberta. Data are preliminary unless otherwise noted. Beginning in 2004, the monthly figures for Banff National Park and Jasper National Park reflected independent travelers only, and do not include people travelling as part of a tour group. The tour group data, however, are included in the annual edition of the Monthly Market Monitor. Source: Parks Canada.

Employment in the Food and Accommodation Sector—The employment figure represents all persons 15 years or older who worked for pay or profit or unpaid work in the food services and accommodation sectors, including businesses or other ventures owned or operated by a related family member during the reference period of the survey. The year-to-date figure is an average for the year. Employment figures are seasonally adjusted. Source: Statistics Canada, Labour Force Survey.

Food Services and Drinking Places—The monthly survey provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population includes full-service restaurants, limited service eating places, special food places and drinking places. Data are unadjusted. The year-to-date figure is an average for the year. Source: Statistics Canada, Food Services and Drinking Places, CANSIM table: 355-0006.

Produced by: *Tourism Research and Evaluation Unit*
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2015 Alberta Tourism Market Monitor

Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air Passengers 2015 (000's of enplanements and deplanements) ¹													
Edmonton International Total	582.1p	561.6p											1143.7p
Per cent change from 2014	-0.3%	-1.0%											-0.7%
Domestic	398.2p	380.9p											779.1p
Per cent change from 2014	-2.7%	-2.9%											-2.8%
Transborder	118.2p	119.7p											237.9p
Per cent change from 2014	-0.3%	-3.0%											-1.7%
International	65.7p	61p											126.7p
Per cent change from 2014	16.6%	17.9%											17.3%
Calgary International Total	1199p												1199p
Per cent change from 2014	2.3%												2.3%
Domestic	800.6p												800.6p
Per cent change from 2014	1.1%												1.1%
Transborder	254.6p												254.6p
Per cent change from 2014	1.8%												1.8%
International	143.8p												143.8p
Per cent change from 2014	9.9%												9.9%
Highway Count 2014 (000's of vehicles) ²													
Hwy 1 - Sask border w-bound	55.9p	56.0p	62.3p	71.5p	77.3p	83.6p	104.0p	110.5p	79.2p	81.7p	64.4p		846.4p
Per cent change from 2013	1.1%	0.0%	-2.2%	9.2%	-1.7%	8.2%	0.9%	1.7%	-1.6%	1.6%	-2.3%		1.4%
Hwy 1 - Banff Pk Gate (2-way)	473.0p	449.1p	499.1p	532.4p	586.2p	659.8p	881.7p	982.6p	645.7p	563.7p	408.5p		6,681.8p
Per cent change from 2013	3.4%	-4.9%	-8.8%	15.8%	1.1%	44.1%	12.7%	4.8%	-1.3%	8.0%	1.2%		6.7%
Hwy 16 - Jasper Pk Gate (2 way)	91.8p	84.7p	105.2p	124.6p	139.5p	162.0p	224.4p	264.8p	154.4p	125.3p	83.6p		1,560.3p
Per cent change from 2013	2.1%	-2.0%	-8.8%	16.1%	2.3%	-8.1%	5.3%	7.1%	-1.0%	5.8%	3.2%		2.3%
Hwy 16 - Jct #897 w-bound	169.6p	157.6p	182.7p	187.5p	200.7p	200.0p	219.9p	223.3p	202.5p	210.4p	178.4p		2,123.6p
Per cent change from 2013	2.8%	-1.6%	3.7%	4.8%	0.2%	0.7%	2.3%	0.8%	0.3%	1.6%	-0.9%		1.3%
National Park Attendance (000's of person visits) 2015 ³ Does not include Group Tours.													
Banff	184.9p												184.9p
Per cent change from 2014	8.1%												8.1%
Jasper	52.8p												52.8p
Per cent change from 2014	6.0%												6.0%
Waterton Lakes	6.7p	7.5p											14.2p
Per cent change from 2014	3.5%	19.1%											10.9%

Sources: Edmonton International Airport, Calgary International Airport, Alberta Transportation, Parks Canada

New monthly figures are shown in bold type. Revisions will be bolded.

p=preliminary

r=revised

e=estimate

18-Mar-15

2015 Alberta Tourism Market Monitor

Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Employment (000's of persons) 2015 Seasonally Adjusted 4													
Accommodation and Food Services	156.9p	157.6p											157.3p
Per cent change from 2014	4.4%	1.5%											2.9%
Accommodation indices 2014 5													
Edmonton Occupancy Rate	58.3%	68.2%	74.1%	74.8%	72.9%	69.7%	64.8%	76.3%	70.8%	72.4%	73.5%	54.1%	69.2%
Point change from 2013	3.5	-2.1	-0.2	-1.1	0.7	-3.8	-0.2	4.7	-3.6	-1.7	-2.1	-1.7	-0.6
Average Daily Room Rate	\$129.90	\$133.50	\$135.81	\$135.34	\$135.51	\$136.02	\$127.73	\$133.28	\$136.87	\$136.22	\$138.41	\$130.12	\$133.90
Calgary Occupancy Rate	57.9%	63.3%	67.6%	71.3%	71.2%	76.4%	77.7%	79.3%	79.6%	73.6%	66.7%	53.6%	70.0%
Point change from 2013	-1.8	-3.3	-2.2	-4.4	-3.4	1.1	-4.5	-1.1	-0.9	-3.5	-8.1	-1.9	-2.9
Average Daily Room Rate	\$157.27	\$161.74	\$160.21	\$164.21	\$163.50	\$184.30	\$190.01	\$150.26	\$170.95	\$171.78	\$166.03	\$153.34	\$166.67
Alberta Resorts Occupancy Rate	38.0%	45.6%	45.1%	46.1%	61.0%	75.9%	87.9%	91.8%	80.6%	54.5%	41.8%	49.6%	60.1%
Point change from 2013	1.0	1.1	-7.7	3.8	5.6	11.1	9.4	4.7	2.9	2.9	0.6	1.3	3.0
Average Daily Room Rate	\$165.86	\$175.65	\$167.05	\$163.06	\$188.85	\$241.20	\$265.38	\$271.53	\$231.32	\$178.21	\$164.72	\$221.21	\$214.70
Other Alberta* Occupancy Rate	59.9%	66.4%	67.9%	59.2%	64.4%	67.1%	68.7%	71.0%	71.7%	70.2%	66.7%	49.4%	65.3%
Point change from 2013	3.6	2.7	3.9	1.4	5.9	3.2	-1.8	0.9	0.8	0.3	-1.9	-2.2	1.5
Average Daily Room Rate	\$128.41	\$129.89	\$129.71	\$127.41	\$127.96	\$130.42	\$130.13	\$130.84	\$132.67	\$133.10	\$132.00	\$131.54	\$130.93
Total Alberta (excluding Resorts) Occupancy Rate	58.8%	65.9%	69.5%	67.2%	68.8%	70.6%	70.3%	75.0%	73.8%	71.9%	68.6%	52.0%	67.8%
Point change from 2013	2.0	-0.6	0.8	-1.2	1.6	0.6	-2.1	1.5	-0.9	-1.3	-3.8	-1.9	-0.4
Average Daily Room Rate	\$137.42	\$140.16	\$140.38	\$142.06	\$141.46	\$149.38	\$149.08	\$137.75	\$146.20	\$146.18	\$143.88	\$137.95	\$142.98
Food Services and Drinking Places 2014 (\$Millions) unadjusted 6													
Total Receipts for Alberta	\$648.7r	\$628.3r	\$715.3r	\$713.9r	\$758.3r	\$745r	\$759.1r	\$768.1r	\$730r	\$765.7r	\$727.4r	\$744p	\$725.8p
Per cent change from 2013	5.3%	2.7%	5.2%	8.2%	8.1%	6.4%	5.9%	6.8%	5.1%	6.9%	3.8%	7.0%	6.0%
Historic Sites and Museums 2015 (000s of person visits) 7													
Visitor Attendance	24.3p	39.7p											64p
Per cent change from 2014	3.4%	-0.3%											1.1%

Sources: Statistics Canada, PKF Consulting Inc, Alberta Culture

New monthly figures are shown in bold type. Revisions will be bolded.

p=preliminary

r=revised

e=estimate

18-Mar-15

1. Air Passengers - Numbers are preliminary estimates of the number of air passengers enplaning and deplaning at the Edmonton International and Calgary International Airports.

Source: Edmonton International Airport and Calgary International Airport Websites

2. Highway Traffic - These data are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders counts all vehicles by direction. Year-to-date is a cumulative total for

Source: Alberta Transportation's Automatic Traffic Recorders (ATR).

3. National Park Attendance - Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.

Beginning in 2004 the monthly figures for Banff National Park and Jasper National Park reflect independent travellers only, and do not include people travelling as part of a tour group. The tour group data, however, are included in the annual edition of the Monthly Market Monitor.

Source: Parks Canada

4. Employment Food and Accommodation Sector - The employment figure represents all persons who worked for pay or profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date total is an average for the year.

Source: Statistics Canada, Labour Force Survey

5. Accommodation Indices - Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.

Source: PKF Consulting Inc. with reproduction and use of information subject to PKF Disclaimer and Restrictions as detailed at www.pkfcanada.com

6. Food Services and Drinking Places - The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the 3 digit NAICS level of 722, which includes: Full-service restaurants, limited service eating places, special food places and drinking places. The year-to-date total is an average for the year.

Source: Statistics Canada, Food Services and Drinking Places

7. Historic Sites and Museums - Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Alberta Museum, the Royal Tyrrell Museum of Palaeontology, and the Tyrrell Field Station.

Source: Alberta Culture and Tourism, Heritage Division.

20-Mar-15